

## **Stewardship Drive Instructions 2018**

This is only what I have done the last few years. Others will hopefully develop other techniques to keep the process fresh and growing.

Start with timeline – I worked backward from the Congregational Meeting in June to assign dates to key steps. In chronological order, these were the steps

### **October**

Establish Stewardship Committee – the last few years there has not been much of a committee. Lots of folks willing to help as stewards, not many to do the general work on stewardship. This past year the Board was challenged to be the committee, but most of the Board members did not participate. John Fetrow was invaluable and steadfast. And of course Mavis did a lot. She created the brochure with a little help in producing text from me. She knew how to do the layout, the art work, and she was enthusiastic. Suzi was also invaluable with the mailings and producing labels and printing brochures and materials for visiting stewards. Maybe a full committee is not the desirable size for this task. Certainly one or two dumps a lot of work on few shoulders.

Schedule Stewardship Dinner. Get it on the calendar.

### **November**

Establish theme and decide on the approach to use for the upcoming stewardship drive. What is the case to be made for generosity this year? Do we use visiting steward this year? What information are we gathering from members? How do we approach friends?

This past year we had an easy time with theme – 25<sup>th</sup> year and transition of ministers. So “Looking Back, Thinking Forward” was a no brainer.

We knew we needed to sell the drive pretty aggressively if we hoped to meet our goal, so we decided to do the home visits. We did not have to do any surveying of the congregation because Long Range Planning and Ministerial Search were doing that. No surveying made the visiting stewards job much easier, according to them.

Go to Board meeting and let them know what you are planning for this year, including the role you'd like them to take. In my mind the Board can only lead if it supports and IS INVOLVED with the drive.

Work with Worship Committee to schedule sermon on the amount – late February to mid-March. I would recommend doing this in-house. This is an excellent time to make the case to between 50 and 70 folks. No one from another church can do this job for us.

Plan stewardship dinner in broad outlines – pot luck? Theme – last year's conjunction

with St. Patrick's Day was wonderful. The Irish theme gave everyone an opportunity to see the event as a party, not an obligation. It provided a unifying approach to entertainment and program. I'd recommend making it a holiday party, even if we need to invent the holiday

**December** – nothing can get done this month except the holidays

### **January**

Recruit stewards. Twenty to twenty-five can handle the job.

Schedule stewardship training.

Begin preparation of brochure.

Schedule time with Suzi to help with printing and mailing as well as assembling steward packets.

Does the membership pledge card need to be changed?

Assign all tasks for stewardship dinner – menu, kitchen crew, set up decoration, program and entertainment. Both Mavis and John Fetrow have good knowledge of how the food, set-up and decorations were done.

### **February**

Create brochure and print 125 copies.

Plan steward training. This past year we did two training sessions and a steward could pick either to attend.

Prepare all materials to be given to stewards, copy and compile. Here's what we did this year. Each steward was to visit three households AND take care of his or her own membership and pledge card. In practice we didn't need to have everyone visiting three, but it helped to initially present that as the expectation

Assign stewards to the folks that they are visiting. We have done this primarily by geography but I am sure there are other ways to do it. Prepare steward packets of pledge cards with label on them and last year's pledge noted also. Doing this early will really help as you will uncover the fact that some contact info is wrong or confusing. How do you find someone whose address is a post office box? What if we have no phone number or email for a member? Putting all of this together and matching members with stewards is a challenging process. I can't emphasize enough that it will take longer than you think. This is the month to do it.

Give Board another update on progress and process.

### **March**

Second week of March I did Visiting Steward Training – see the document called Stewardship Training 2018. We did a Saturday morning session and a Sunday 11:45 session. It's important to have all the materials prepared so that people get their packets

at the training session they attend.

Last year the dinner was done on March 17<sup>th</sup>. I felt that although this was early, there were advantages to having plenty of time to complete the drive and get the results to the finance committee for budget purposes.

### **April**

The Stewardship visits can begin on the day after the dinner and continue for three weeks. This takes us through the first week or 10 days of April. Even though we hope to complete the drive in three weeks, there are as many as 15 visits not yet completed by that time – because of snowbirds, vacations, procrastination. At a certain point I have found I have to simply take either ride the stewards a bit or take charge of these cards myself and get the work done. Better managers may be more successful at bringing this off than I have been.

### **May**

We wrote personal thank-you notes to all donors this year. We didn't do it until mid-June and they were not sent until nearly July. I think May is a good time to do this task. If there were more folks working on the Stewardship Committee, the task would be simpler. As it was with only two of us, we each wrote forty notes. I strongly recommend that we continue the practice of sending personal notes to all donor. It's good stewardship.

### **June**

Congregational Meeting to approve the budget in early June. Depending on the success of the drive this can be a celebration or a dirge. But at least the process is over for another year.

Another issue to address – We have a lot of folks who do not understand the finances of UUCWI and what it means to be a financial steward. Our core donors are doing a lot of heavy lifting and they are near their limit on what they can give. We need to find an effective way to talk to new members and friends about financial stewardship. Finance Committee is interested in this. Success in this endeavor is critical to our long-term strength and survival.

John Long and John Fetrow